eMoney Boot Camp

eMoney Boot Camp - Day 1 Agenda

8:15-8:30 Breakfast

8:30-8:45 Goals and Objectives

Discuss desired outcomes.

8:45-9:00 Module 1 What is eMoney?

Identify key components.

- Client Site
- Connections
- Vault
- Modular Needs
- Retirement Income
- Reports
- Alerts
- Mobile applications

9:00-9:15 Module 2 Effective Client Communication

Build a 30-second elevator pitch.

- 7 Steps to Success
- Name in lights
- Sample Clients
- What's in it for them approach
- Security
- Don't resell software

9:15-9:30 Module 3 Marketing

Develop strategies for discussing eMoney with clients.

- Utilizing eMoney Marketing Materials
- Custom videos
- Links to site and videos

9:30-9:45 Module 4 Gathering Data

Learn efficient ways to get the data from your clients.

- Interview vs. fill out the questionnaire
- Lead with soft questions
- Your own fact finder

9:45-10:00 Break

10:00-10:30 Module 5 First Steps

Making sure your system is set up properly.

- Client List
- Choosing the right Tool
- Organization Manager/Tool
- My Info
- Client Grouping
- System Defaults
- Resources

10:30-12:00 Module 6 Advanced Planning Tool- Fact Finder

The advisor with the most data wins.

- Systematic approach
- Cash flow basics
- Ownership
- Professional Services Group
- The “other” important stuff

12:00-1:00 Lunch

1:00-1:30 Module 7 Connections

Getting updated data.

- Advisor based connections
- Different types of connections
- Client initiated connections
- Maintenance
- Managing client expectations

1:30-2:00 Module 8 Advanced Planning Tool- Reports

Understanding the Reports tab.

- Verifying data
- Common reports
- Drill down
- Changing parameters
- Comparisons

2:00-2:15 Break

2:15-2:30 Module 9 Advanced Planning Tool- Analyze

Understanding the Analyze tab.

- Process Approach
- Navigation
- Building a Plan
- Adding What-ifs
- Adding Techniques

2:30-2:45 Module 10 Advanced Planning Tool- Present

Building the Book.

- Navigation
- Adding Pages
- Adding Chapters
- Configuring Pages
- Adjusting the Look of the Pages
- Templates

2:45-4:00 Module 11 Advanced Planning Tool- Next Steps

Understanding the Next Steps to enhancing the relationship.

- Client Site
- Vault
- Alerts
- Alliance Partners
- Mobile Access

4:00-4:15 Questions and Answers

eMoney Boot Camp - Day 2 Agenda

8:15-8:30 Breakfast

8:30-8:45 Review Discussion

8:45-9:45 Module 12 Building a Retirement Plan

Retirement Case Study.

- Process Approach
- Adding Techniques
- Adding What-ifs
- Copying Plans
- Comparisons

9:45-10:00 Break

10:00-10:45 Module 13 Building a Retirement Presentation

How do you want to tell the Retirement story?

- Adding and Adjusting the Right Chapters
- Adding Relevant Pages
- Building Templates
- Options for Presenting

10:45-12:00 Module 14 Investment Planning Tool

Develop new ways to analyze investments.

- Investment Proposal
- Investment Policy
- Investment Grouping
- Portfolio Analysis Center
- Monte Carlo
- Investment Reports

12:00-1:00 Lunch

1:00-1:30 Module 15 Financial Concepts Tool

Illustrating Financial Strategies.

- Risk Advantaged Portfolio
- Life Insurance Advantage
- Wealth Diversification Advantage

1:30-2:15 Module 16 Retirement Income Tool

Review the cash flow driven retirement planning tool.

- Fact Finder
- Analyze –Active Pages
- Present
- Comprehensive Nature of This Tool

2:15-2:30 Break

2:30-3:00 Module 17 Needs Analysis Tool

Goal based planning options.

- Create
- Fact Finder
- Analyze- Active Pages
- Present
- Follow Up
- Custom Analyses

3:00-3:30 Module 18 Building Infrastructure

Divide the work and conquer.

- Roles and Responsibilities
- Sharing Rules
- Process Driven Approach From Start to Finish
- Exporting Accounts
- CRM Integration

3:30-4:00 Questions and Answers